

AD HOC REPORT FOR REFERRED LIST

Some agencies are experiencing difficulty using the instructions provided in training about how to run a report on the referral list because their security gives them access to multiple departments. The following instructions will allow you to run an Ad Hoc report that will return information only about the specific requisition you are looking for.

1. Login to Insight.
2. From the Reports drop down menu, select 'Ad Hoc Reports.'
3. Select the link for 'New Report' at the top left of the page.
4. Enter a name for your report. (Example: 'Exam Number' Referral List)
5. Select 'Referred List' for the Report Data.
6. Leave the Report Style on Tabular.
7. Use the red 'Add' button to move the fields below to the box on the right for 'Select columns you wish to display.'
 - a. Requisition Number
 - b. Requisition Title
 - c. Job Title
 - d. Last Name
 - e. First Name
 - f. Email
 - g. Home Phone
 - h. Alternate Phone
8. From the first row in the Filters section, select Requisition Number from the first drop down menu. Leave the second drop down on 'equals' and enter **your requisition number** into field to the right of 'equals.'
9. Leave the rest of the fields on their default settings, and select Run Report.

* Report Name:	0000 Referral List				
* Report Data:	Referred Lists				
* Report Style:	Tabular				
* Select columns you wish to display:	<div>Referred Status Requisition Status SSN State Zip</div>	<div>Add > < Remove</div>	<div>Requisition Number Requisition Title Job Title Last Name First Name</div>	<div>Move Up Move Down</div>	
Filters:	Requisition Number	▼	equals	▼	12345
	== None ==	▼	equals	▼	
	== None ==	▼	equals	▼	
Order By:	== None ==	▼	Ascending Descending THEN BY		
	== None ==	▼	Ascending Descending THEN BY		
	== None ==	▼	Ascending Descending		
Summarize Columns:	== None ==	▼	Average	▼	
Make Public:	No				

Run Report